SHARP-SHOOTER

TAKING AIM TO BETTER SERVE THE CUSTOMER

Volume 3, Issue 3 *April, 1998*

First Policy & Systems Change Preview Meeting

The first Policy & Systems Change Preview Meeting was a huge success. Registrations have exceeded our initial estimates of 600 participants. We held three alternate sessions to accommodate all employees registered. We will plan accordingly for the July meetings. The key topics discussed during the first meeting included:

- Overview of SHARP Current and Future Upgrades
- Changes to Expect in This Upgrade for Payroll and Human Resources
- Change Management
- Agency Readiness
- Agency Responsibility
- DPS Assistance Being Provided to Agencies
- Hardware and Software Requirements

Connie Guerrero (DPS) and Cindy Lo (A&R) reviewed process changes, the impacts of those changes on agencies, and recommended action for agencies to take so they will be prepared for the upgrade. Documents summarizing these changes were distributed at the meeting and are also being sent to Agency Heads and HR Managers.

During the agency readiness presentation, Doug Quinn (DISC) covered an Agency Readiness Checklist comprised of actions agencies need to preform to be ready for the upgrade, with recommended target dates to have the actions completed. Since only five months remain for completion of the upgrade project, it is imperative the target dates are met so the users will be properly prepared for the upgrade and associated training. These checklists were distributed at the meeting and are also being sent to Agency Heads and HR Managers. The SHARP Upgrade Team asked that each agency appoint a contact person for coordination of the checklists.

Mary Adkins (DPS) discussed agency responsibilities and presented the SHARP Upgrade Team's views on those responsibilities. Mary explained the term vanilla – going with delivered functionality, which means that some agency unique needs must be met off-line or with a work-around. She talked about the State being one employer and how that will result in agency operators having more access to statewide data. Mary expounded on the need to understand regulations and policies not just data entry, and reducing risks by paying attention to error reports and preliminary pay calculations.

Jenny Haile (DPS) offered DPS assistance in the areas of:

- Regulations Questions
- Basic SHARP Questions
- Delegated Authority Agreement
- If Ad-hoc Reports are Needed

Jenny informed us of DPS's role of maintaining data integrity by becoming knowledgeable in all areas of data entry to help agencies with correct data entry.

The minimum software and hardware requirements were covered in the March SHARP-SHOOTER newsletter and are listed here again for your reference:

- IBM Compatible 486/66MHZ
- 16 MB Main Memory
- Windows 95
- 60 MB Disk Space
- No Other Programs Running
- 28.8 Modem for Dial Up if Needed

Additionally, Tom Riggle explained that agencies needing to purchase new equipment to meet the minimum requirements might want to use the PeopleSoft recommended software and hardware as follows:

- IBM Compatible Pentium 100 and Up
- 32 MB Main Memory
- 100 MB Disk Space
- Windows NT 4.0
- 28.8 Modem for Dial Up if Needed

He further explained, as agencies upgrade equipment they should ensure it meets or exceeds these standards.

The July meeting will include a demonstration of the upgraded SHARP system and information on the computer based training approach.

Inside This Issue

This issue will focus on business process changes involving:

- Position Funding
- Retro Pay Processing
- Retro Benefit and Deduction Processing

Position Funding

Funding in the upgraded version can be established at department, position pool, position, job code or appointment levels. However, the use of position pools is strongly encouraged as it allows funding flexibility within a department yet alleviates the burden of having to enter funding for each position. All of the panels used to set up a position pool in the upgraded system will be accessed through the Define Business Rules window as opposed to the Pay Process Tables window, or the Time and Leave window where funding group data is accessed in the current version.

The funding group table found in the current version of SHARP contains various funding lines and each line represents a unique combination of fund, index, and PCA codes. A Position pool uses the same concept except each funding line is assigned a code, called account code. Each account code will represent a unique combination of fund, index and PCA codes. The account codes are then associated with position pools just as funding lines are associated with funding groups in the current version. The account codes and the position pool ID's are established on two separate tables, the Account Code table and the Position Pool table. They are then associated using the Department Budget/Encumbrance U.S. table.

Funding for earnings, deductions and taxes must be established separately in the upgraded system. This provides increased flexibility in that earnings, deductions and taxes may be funded differently from each other but it increases the amount of data entry.

The Funding Group field currently located on the Position Data 2 panel will be replaced by the Position Pool ID field on the Position Data 1 panel.

The Funding Group field currently appearing on timesheets will be eliminated. Funding may no longer be changed using the time and leave process. Instead, agencies will use the new Department Budget/ Encumbrance tables to override the established funding for a specific earnings code. Funding changes can be entered on the Department Budget/ Encumbrance panels until final pay calculation to be in effect for the pay period being calculated.

Prior period funding adjustments will continue to be processed outside of SHARP as occurs in the current system.

The specifics on how to set up account codes and position pools will be provided in the training materials.

Retro Pay Processing

The SHARP system upgrade will provide a new process for detecting and calculating retroactive earnings adjustments due to pay rate changes. The Retro Pay Process detects a retroactive job change or additional pay change and recalculates payments from the retroactive effective date through the last confirmed pay period. The system compares these amounts to the original paycheck amounts and determines the gross amount due from or owed to the employee. All payments will be included on the employee's next on-cycle paycheck. All amounts due from the employee will be collected through arrears processing. The retroactive pay processing panels are found in the Compensate Employees/Manage Retroactive Processing window. This new process will greatly reduce the number of adjustments users will need to request.

The system will automatically create Retro Pay requests whenever changes are made to FLSA Status, Standard Hours, Compensation Frequency or Compensation Rate on Job Data or any changes on Additional Pay **and** the effective date of the change is earlier than or equal to the pay period end date of the last check

continued on page 3

SHARP-SHOOTER will be published monthly by the Statewide Human Resource and Payroll Project. This publication is designed to inform state agencies and their users of the status of the SHARP Project.

Project Directors

Tom Riggle, State of Kansas
Todd Higgins, Andersen Consulting

Sponsors:

Bill McGlasson, Director DPS
Shirley Moses, Director A&R

Contributors:

Cindy Lo
Kathy Ogle
Doug Quinn

Comments and articles should be directed to:

Doug Quinn
SHARP Project
Landon State Office Building
900 S.W. Jackson St., Suite 751-S
Topeka, KS 66612-1234
Fax (785) 296-6594

Retro Benefit and Deduction Processing

Another enhancement to the SHARP system provided by the upgrade will be the new process for handling retroactive benefit and deduction adjustments. This will greatly reudce the number of adjustments users will need to request. The Retro Benefit/Deduction Process detects a retroactive change to employee or benefit related data that has an effective date prior to the last confirmed pay period end date and recalculates payments from the retroactive effective date through the last confirmed pay period. The system compares these amounts to the original paycheck amounts and determines the gross amount due from or owed to the employee. All payments will be included on the employee's next on-cycle paycheck. All amounts due from the employee will be collected through arrears processing. The retroactive benefit and deduction processing panels are found in the Compensate Employees/Manage Retroactive Processing window.

The system will automatically create Retro Benefit/Deduction requests whenever changes are made to eligible benefits/deductions **and** the effective date of the change is earlier than or equal to the pay period end date of the last confirmed check paid to the employee. Eligible benefits/deductions include group health insurance, flexible spending accounts, optional group life insurance, general deductions and benefit program participation. Changes to deductions based on earnings (such as KPERS, TSA and VTSA) are not included in this process. They are handled as part of the adjustment process.

Agency personnel may review Retro Benefit/Deduction requests on the Retro Benefit/Deduction Request Summary panel before the requests are calculated. If there are requests that affect the same retroactive benefit/deduction information for an employee, the system will resolve potential conflicts between the duplicate and the original with differing methods, depending upon the status of the requests. The Process Flag field on this panel may be used to determine the status (where the request is in the process) of the request. All requests should be reviewed and special attention should be given to duplicates to ensure they received the intended handling.

The Retro Benefit/Deduction Calculate Process will be generated nightly. The Retro Benefit/Deduction Messages panel displays error messages that are a result of the calculation process. The Retro Benefit/Deduction Review panel is available to review calculation results by pay period end dates. The Retro Benefit/Deduction Summary panel displays the total calculated amount across pay period end dates.

Retroactive benefits and deductions designated "OK to Process" by the agencies will be loaded to Paysheets after Paysheets are created during the on-cycle payroll process. Amounts owed to the employee will be reimbursed in full in the next paycheck. For amounts due from employees, an arrears balance will be established for collection in full on the employee's next paycheck. Agency personnel will be responsible for ensuring the prompt collection of the balances.

The results of the Retro Pay process may be reviewed by going to any of the on-line panels previously mentioned.

The specifics of retroactive benefit and deduction processing will be provided in training.

Retro Pay Processing

continued from page 2

paid to the employee.

The system places all requests on the Retro Pay Request Table. Agency personnel may review Retro Pay requests on the View/Delete Retro Pay Request panel and, if necessary, delete any before the requests are calculated. The Process Flag field on this panel may be used to determine where a request is in the Retro Pay process at any given time.

The Retro Pay Calculate Process will be generated nightly. The Retro Pay Review and Update panel is available to review calculation results. For calculations based on a mid-pay period change, the system will prorate the retroactive pay amount. After requests have been calculated, processing may be undone by changing the Process Flag using the Retro Pay Delete panel.

All Retro Pay requests designated "OK to Process" will be loaded to Paysheets after Paysheets are created during the on-cycle payroll process. For amounts due from employees, an arrears balance will be established and agency personnel will be responsible for the maintenance and collection of the balances.

Agency personnel may review the results of the Retro Pay process by going to several on-line panels (Retro Pay Messages, Retro Pay Request Summary, Retro Pay Summary).

The specifics of retroactive pay processing will be provided in training.

Dear Dead Eye…

Q: *Our agency does not utilize the recruitment process in SHARP. Therefore, is it necessary to purchase Microsoft Word if we are not using the system generated letters?*

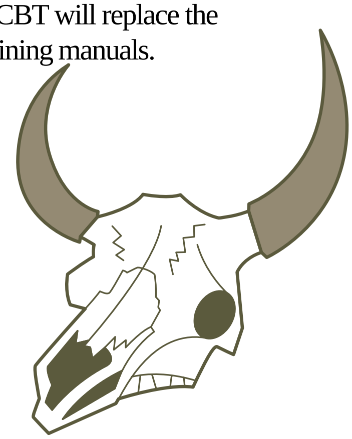
A: No it is not necessary to purchase Microsoft Word at this time. Currently the only area using Word that will affect the users is the system generated letters for the recruitment process. Although, in the future when security is added to the Training Administration Module, users will be able to generate various letters requiring Microsoft Word.

Q: *I read in the March issue of the SHARP-SHOOTER that procedures have been tested to run the current version (4.02) of PeopleSoft on Windows 95. Will copies of these procedures be available to our agency?*

A: DISC Bureau of Department of Administration Systems (BDAS) is developing prototype procedures to run version 4.02 on Windows 95. These procedures will be distributed to agencies. Running version 4.02 on Windows 95 will allow users to install the appropriate software now instead of having one computer for version 4.02 and another for version 7.0, or if only one computer is available that user will not have to wait until the last possible moment to load Windows 95.

Q: *Will we be receiving revised sections to our SHARP training manuals to reflect the new updates in PeopleSoft 7.0?*

A: We are completely re-designing the training. The training will be in a Computer Based Training (CBT) format. You will be able to download it from the server. You can use it directly from the server, save it to a different drive and use that for reference, and you can print out as much of the training as you want. The CBT will replace the SHARP training manuals.



All questions for Dear Dead Eye are welcomed and should be directed to "Dead Eye" at the project address, (785)296-6804, GroupWise - Quinn, Douglas, or E-Mail - dougq@dabdas.wpo.state.ks.us
All questions will be answered in the following issue of the newsletter.

State of Kansas SHARP Project

SHARP Project
900 S.W. Jackson St., Ste. 751S
Topeka, KS 66612-1234
173-195